

# ‘I ASSURE’ REQUIREMENTS PACKAGE CHECKLIST

This form is completed by the Task Monitors and forwarded to DISA/DITCO with the complete ‘I Assure’ Requirements Package.

*(electronic signatures (/s/)) are acceptable)*

1. Task Order (TO) Title.	
2. Acquisition Lead-Time. For the purposes of tracking lead-times, indicate the date you began working on this requirement ( <i>see the TO Guidelines, Chapter 3</i> ):	
3. Tracking Number:	
<b>4. Attachments Checklist.</b> Complete package must include <u>all</u> of the following <u>mandatory</u> items. Send files electronically via e-mail to <a href="mailto:iascottafb@scott.disa.mil">iascottafb@scott.disa.mil</a> . <b>Partial packages are NOT accepted</b> (see the TO Guidelines, Chapter 3, Paragraph A). You may fax any items not available electronically to <b>(618) 229-9440</b> or DSN 779-9440. ( <i>to check a box, right-click on the box, choose “Properties,” and click on “Checked” under “Default Value”</i> )	
<div style="margin-left: 20px;"> <input type="checkbox"/> Requirements Package Checklist, <a href="#">Attachment 5</a>  <input type="checkbox"/> Statement of Work (SOW), <a href="#">Attachment 3</a> (in MS Word Office 2000 compatible format)  <input type="checkbox"/> Independent Government Cost Estimate (IGCE) (MS Excel Office 2000 compatible format)  <input type="checkbox"/> Funding Document(s) (scanned or other electronic version is preferable) (<i>Note - for customers external to DISA, certified funds are needed to start the tasking process. If using DISA funding, only committed funds are needed to start the process, but certified funds must be provided before task order award can occur.</i>)  <input type="checkbox"/> Selection Recommendation Document (SRD) (<a href="#">Attachment 4</a> of the TO Guidelines) (<i>Note - if the task order will be competed among contractors, the SRD is needed <b>after</b> proposals have been evaluated.</i>)  <input type="checkbox"/> Evaluation Criteria (<i>Required when not citing a FASA exception. See Section C of Requirements Checklist for Evaluation Criteria Plan</i>)           </div> <p style="text-align: center;"><b>Include the following items <u>only if determined necessary</u> for your individual requirement.</b></p> <div style="margin-left: 20px;"> <input type="checkbox"/> TO-unique DD Form 254, <u>only if security requirements exceed the basic contract DD Form 254</u> (MS Word or FormFlow compatible)  <input type="checkbox"/> Acquisition Approval Group (AAG) approval (<u>required for DISA customers only</u>; attach evidence of approval received)           </div>	
<b>5. Task Order Information.</b> <b>a. Contract Type</b> ( <i>check one</i> ). Time-and-materials (T&M) and cost-reimbursement (CR) contract types require justification in accordance with Federal Acquisition Regulations ( <i>see the TO Guidelines Chapter 3, Paragraph F for an explanation of contract types - note that the Contracting Officer makes the final determination of which order type is in the best interest of the Government</i> ).	
<div style="margin-left: 20px;"> <input type="checkbox"/> Firm fixed price (FFP) (no justification required)  <input type="checkbox"/> Cost-Reimbursement (CR) (provide justification in the box, below)  <input type="checkbox"/> Time-and-Materials (T&amp;M) (provide justification in the box, below)           </div>	
<b>b. Rationale:</b> T&M and CR contract types require justification in accordance with Federal Acquisition Regulations ( <i>see Chapter 3, Paragraph F</i> ):	
<b>c. FASA Exception.</b> If you are citing a FASA exception, designate which one below with a justification. <div style="margin-left: 20px;"> <input type="checkbox"/> The agency need for services is of such urgency that providing such opportunity would result in unacceptable delays  <input type="checkbox"/> Only one such contractor is capable of providing services required at the level of quality required because they are unique or highly specialized  <input type="checkbox"/> The order should be issued on a sole-source basis in the interest of economy and efficiency as a logical follow-on  <input type="checkbox"/> It is necessary to place an order to satisfy a minimum guarantee           </div> <p>FASA Exception Justification:</p>	
<b>6. Economy Act.</b> This organization has made the appropriate Economy Act decisions <b>in accordance with local agency requirements:</b> <i>(electronic signatures (/s/)) are acceptable)</i>	
Signature and Date:	

7. Evaluation Criteria and Associated Weight Plan (Required when not citing a FASA exception) *(Note - evaluation criteria percentage must total 100% for non-cost factors. "Past Performance" is a mandatory criteria. Cost is a mandatory criteria since it is integral to the best value trade-off decision. A percentage will not be applied to cost criteria.)*

Basis of evaluation (check one): ☐ Best Value Trade-Off ☐ Lowest-Price, Technically Acceptable  
*See Chapter 3, Paragraph H.3 of the Task Order Guidelines for an explanation of each method.*

### Non-Cost Factors

*Remember to ensure that the total of all non-cost factors equals 100%*

*List the specific areas of your past performance requirements to be evaluated. These areas should correspond with, and relate to, specific SOW requirements.*

#### 1. Past Performance.

%

- a.
- b.
- c.
- d.

*List the specific areas of your technical/management requirements to be evaluated. These areas should relate to specific SOW requirements.*

#### 2. Technical/Management Approach.

%

- a.
- b.
- c.
- d.

*List any other evaluation criteria important to you, and the associated weights, below.*

#### 3. Other Factors (if applicable).

%

- a.
- b.
- c.
- d.
- e.

### Cost Factor

Percentages are applied to past performance, technical/management approach and any other non-cost factors for which you may want to evaluate contractor proposals. Note that balancing cost against the non-cost factors is how you make your best value trade-off decision, and as a result, a percentage is not applied to the cost factor. Indicate whether **all non-cost** evaluation factors, when combined:

☐ Are significantly more important than: ☐ Approximately equal to: ☐ Significantly less important than:  
 ...the Cost Factor

*In addition, indicate whether or not you want the estimated total dollars available for this requirement to be disclosed to the vendors.*

☐ YES - disclose available funds \$  *(amount)* ☐ NO - do not disclose available funds

Indicate type of technical proposal requested: ☐ Oral ☐ Written

If an oral technical proposal is requested, indicate any additional guidance for the vendor. It is recommended you review Section G.5 of the 'I Assure' contracts to determine if any other requirements should be included in the vendors' technical oral presentations (i.e. cost, security, etc). Please indicate whether the additional information should be part of the oral presentation or hard copy to be passed out following the oral presentation. Also, indicate the amount of time to be allowed the vendor to conduct the presentation (include additional time for questions and answers). **Note: The TM or POC is responsible for scheduling vendor proposal presentations to include time and place.**

Additional Information:

<b>8. TM Certification:</b> I recognize that by submission of this package, I accept the responsibilities for Task Monitor roles (pre-award and post-award) as defined in the 'I Assure' Task Order Guidelines and failure to carry out these responsibilities could result in my package being returned without award action or in my inability to use the 'I Assure' contracts for future requirements. I further certify that the requested contractor services do not include inherently Government functions in accordance with <a href="#">Federal Acquisition Regulation (FAR) Subpart 7.5</a> ( <i>electronic signatures (/s/) are acceptable</i> ).	
Primary TM Signature and Date:	
Alternate TM Signature and Date:	
<b>9. TM Training Certification (Applies to DISA TMs <u>ONLY</u>):</b> DISA TMs are required to have Contracting Officer's Representative (COR) training prior to appointment in accordance with DISA Acquisition Regulation Supplement (DARS), Subpart 1.602-2-90(b) <a href="http://www.disa.mil/d4/dars/pt1.html#1.6">http://www.disa.mil/d4/dars/pt1.html#1.6</a> , and must complete refresher training annually. Provide the date that COR training was completed for the Primary and Alternate TMs (if training has not yet been completed, provide the anticipated date of completion):	
Primary TM Training Certification Date:	
Alternate TM Training Certification Date:	
<b>10. Required Points of Contact.</b> ( <i>include name, code, e-mail address, and phone/fax numbers</i> ):	
Acquisition Liaison (DISA only):	
TM Supervisor:	
<b>11. PDC/TSR, if applicable:</b>	
PDC Code:	
TSR Number:	
Letter from Resource Manager to DITCO:	

(continue to next page for the Section 508 Determination)

## SECTION 508 DETERMINATION FOR TASK ORDERS

### Reference DISA Section 508 Interim Policy

[http://disa.dtic.mil/D4/pa\\_fy01.shtml](http://disa.dtic.mil/D4/pa_fy01.shtml)

In 1998, Congress amended the Rehabilitation Act to require Federal agencies to make their electronic and information technology accessible to people with disabilities. Inaccessible technology interferes with an individual's ability to obtain and use information quickly and easily. Section 508 was enacted to eliminate barriers in information technology, to make available new opportunities for people with disabilities, and to encourage development of technologies that will help achieve these goals. As a result, this checklist must be completed by your organization's requirements official and included in all procurement request packages.

<b>Task Order Title:</b>	
<b>Customer Agency/Organization:</b>	

1. Will electronic and information technology (E&IT) products or services be delivered under this acquisition? E&IT has the same meaning as "information technology," except E&IT also includes any equipment or interconnected system or subsystem of equipment that is used in the creation, conversion or duplication of data or information. The term E&IT, includes, but is not limited to, telecommunication products (such as telephones), information kiosks and transaction machines, worldwide websites, multimedia and office equipment (such as copiers and fax machines).

*(to check a box, right-click on the box, choose "Properties," and click on "Checked" under "Default Value")*

- ☐ Yes (proceed to paragraph 2)  
☐ No (sign below, attach to procurement request package, and forward to the Contracting Officer.)

Requirements Official Printed Name	Date	Phone Number	Signature
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2. Does a Section 508 exception apply to this acquisition (non-availability of commercial products or services that meet all applicable standards is not considered an exception)?

- ☐ Yes (proceed to paragraph 3)  
☐ No (proceed to paragraph 4)

3. Section 508 accessibility standards do not apply to this acquisition based on the following exception(s). See DISA Interim Guidance, Section 6 at [http://disa.dtic.mil/D4/pa\\_fy01.shtml](http://disa.dtic.mil/D4/pa_fy01.shtml) for definitions of exceptions. The E&IT:

- ☐ Is for a National Security System (Identify the NSS Program and attach a short explanation which supports this exception. Also have the DISA CIO, IT Engineer's Office sign below.

DISA CIO, IT Engineer's Office (D031) or Customer Official (for non-DISA) Printed Name	Date	Phone Number	Signature
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- ☐ Is acquired by a contractor incidental to a contract.  
☐ Is located in spaces frequented only by service personnel for maintenance, repair or occasional monitoring of equipment.  
☐ Is for telecommunications services and no contractor provided terminal equipment (telecommunications products) is included.  
☐ Is a micro-purchase (\$2,500 and below) and will be acquired as one-time open market buy, and not under an existing contract (e.g., GSA Schedule).  
☐ Would impose an undue burden on the agency (see Enclosure 4 to DISA/D4 memorandum dated 9 Jul 2001, Section 508, Interim Acquisition Policy Guidance, for the format for Undue Burden Exception Determination and Certification).  
☐ Other - attach detailed explanation:

(Sign below, attach to procurement request package, and forward to the Contracting Officer. If an "undue burden" exception is claimed, a completed copy of Enclosure 4 must also be included.)

Requirements Official Printed Name	Date	Phone Number	Signature
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4. Is this acquisition for a commercial item as defined at FAR 2.101 (<http://www.arnet.gov/far/loadmainre.html>)?

- ☐ Yes (proceed to paragraph 5)  
☐ No (proceed to paragraph 6)

5. Is a commercial item fully compliant with Section 508 accessibility standards available in the commercial marketplace in time to meet the agency's delivery requirements?

- ☐ Yes (proceed to paragraphs 6 and 7)  
☐ No (sign below, complete Enclosure #5, attach this document, the procurement request package and forward to the Contracting Officer).

Requirements Official Printed Name	Date	Phone Number	Signature
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6. The following Section 508 Accessibility Standard(s) (Technical & Functional Performance Criteria) are applicable to this acquisition (check as appropriate). Contact the CIO IT Engineer's Office at (703) 696-4334 for assistance in determining which standards may apply. Incorporate all applicable Section 508 standards in the requirements document of the purchase request package or use the standard "Section 508 Compliance" specification set forth in the Interim 508 Policy, Paragraph 4.

#### Technical Standards

- ☐ 1194.21 - Software Applications and Operating Systems  
☐ 1194.22 - Web Based Intranet and Internet Information and Applications  
☐ 1194.23 - Telecommunications Products  
☐ 1194.24 - Video and Multimedia Products  
☐ 1194.25 - Self-Contained, Closed Products  
☐ 1194.26 - Desktop and Portable Computers  
☐ 1194.41 - Information, Documentation and Support

7. Functional Performance Criteria is the minimally acceptable standards to ensure Section 508 compliance. This block should also be checked to ensure that the minimally acceptable EIT is proposed. The Technical Standards above in Paragraph 6 facilitate the assurance that the maximum technical standards are provided to the Offerors.

#### Functional Performance Criteria

- ☐ 1194.31 - Functional Performance Criteria

Requirements Official Printed Name	Date	Phone Number	Signature
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